From:	Rellen Hayes
To:	Tucker-Potter, Stacy
Cc:	Hughes, Ernie
Subject:	Directory Project Data Deliverables
Date:	Monday, May 20, 2019 2:00:27 PM
Attachments:	DataDocs_DueBacktoPCI.doc PCI Occupation Codes.xlsx Sample Survey Questions.doc How to Send and Receive Data Via SSH.doc

---

Hi Stacy,

Here are the data deliverables we'll need from you so we can start setting up for your directory project. I've pre-filled out the data docs based on what most schools choose. Please review the forms, fill in any missing information and make any necessary changes. Once you've had a chance to review the data requirements, please let me know an ETA for the data file. We are hoping to start your project in July and we will need the data file 3 weeks prior to launch.

- **Data Documents:**
  All data documents are in the attachment 'Data Docs Due Back to PCI'
  - Step 1: Complete the '**Standard Data Fields for Collection and Printing**' (p. 1-5 in attachment 'DataDocs_DueBacktoPCI)
    - Did you select that you would like to use PCI's Occupation Codes or are you unsure if you would prefer to use yours or ours?
      - Attached is 'PCI Occupation Codes'
    - Are you debating on having PCI ask additional survey questions during the update call?
      - Attached is the 'Sample Survey Questions'
  - Step 2: Populate your complete data file based upon selected fields in the document completed during Step 1. Feel free to flag your VIPs (Board of Trustees and top exclusive donors) so they receive a softer outreach touch. Also, remember to include any "Do Not Contact" flags, "Deceased" flags and "Lost Alumni" flags.
  - Step 3: Run some queries on your data file prior to sending to PCI.
    - Complete the '**Record Count Sheet'** on p. 6 in attachment 'DataDocs_DueBacktoPCI'
  - Step 4: How would you prefer data is formatted when sent back to you from PCI?
    - Complete the '**Data Entry Specifications'** document on p. 7 in attachment 'DataDocs_DueBacktoPCI'
  - Step 5: How often and in what format would you like your data returns?
    - Complete the '**Data Return Scheduling and Specifications'** document on p. 8-9 in attachment 'DataDocs_DueBacktoPCI'
  - Step 6: **Transfer Your Data to PCI:**
    - How do you use and prepare an SSH site for a secure data transfer?
      - Use the helpful document and guide 'How to Send and Receive Data Via SSH'
      - Call (757) 965-8231 or email Stephen Newchok at snewchok@publishingconcepts.com to find out the SSH site username and password.

Please don't hesitate to reach out if you have any questions.

Best regards,

Rellen

Rellen Hayes
Publishing Concepts | Account Manager
Proud PCI Associate since 2014

T: 972.728.3687
E: rhayes@publishingconcepts.com
www.publishingconcepts.com

Back-to-Back Winner! For two years in a row PCI has been named the "#1 Best Place to Work" in the state of Texas (The Texas Association of Business and the publishers of *Texas Monthly*) and in Dallas-Fort Worth (*Dallas Morning News*). Research shows that a highly engaged workforce drives higher overall client satisfaction.

CONFIDENTIALITY NOTICE: This e-mail message is intended to be received only by persons entitled to receive the confidential information it may contain. E-mail messages may contain information that is confidential and legally privileged. Please do not read, copy, forward, or store this message unless you are an intended recipient of it. If you have received this message in error, please forward it to the sender and delete it completely from your computer system.

Disclaimer

The information contained in this communication from the sender is confidential. It is intended solely for use by the recipient and others authorized to receive it. If you are not the recipient, you are hereby notified that any disclosure, copying, distribution or taking action in relation of the contents of this information is strictly prohibited and may be unlawful.

This email has been scanned for viruses and malware, and may have been automatically archived by **Mimecast Ltd**, an innovator in Software as a Service (SaaS) for business. Providing a **safer** and **more useful** place for your human generated data. Specializing in; Security, archiving and compliance. To find out more Click Here.